

DEPARTMENT OF WORKFORCE DEVELOPMENT
DIVISION OF WORKFORCE SOLUTIONS
ADMINISTRATOR'S MEMO SERIES

☐ ACTION
☒ NOTICE 05-09

ISSUE DATE: 6/13/05
DISPOSAL DATE: Ongoing

*PROGRAM CATEGORIES:

<input type="checkbox"/> AS	<input type="checkbox"/> FM	<input type="checkbox"/> ML	<input type="checkbox"/> TR
<input type="checkbox"/> CC	<input type="checkbox"/> FL	<input type="checkbox"/> NA	<input checked="" type="checkbox"/> W-2
<input type="checkbox"/> CS	<input type="checkbox"/> IT	<input type="checkbox"/> RA	<input type="checkbox"/> WIA
<input type="checkbox"/> CF	<input type="checkbox"/> JC	<input type="checkbox"/> TC	
<input type="checkbox"/> CR	<input type="checkbox"/> LM	<input type="checkbox"/> TA	

To: County Departments of Human Services Directors
County Departments of Social Services Directors
Tribal Chairpersons/Human Services Facilitators
Tribal Economic Support Directors
W-2 Agency Directors

From: Bill Clingan
Division Administrator

Re: Required Training For Wisconsin Works And Related Workers

Purpose

The Department of Workforce Development (DWD), Division of Workforce Solutions (DWS) requires training for Wisconsin Works (W-2) and related workers in county, consortia, private and tribal W-2 agencies*. The requirements are based on Administrative Rule DWD 17 (February 1, 2003), and operational needs. This Administrator's Memo outlines both the initial and the ongoing training requirements for W-2 staff that perform the functions of Financial Employment Planners (FEP) and Resource Specialists (RS).

Introduction

DWS Administrator's Memos 04-16, 04-19 and 04-20 affirmed W-2 as an employment program, and W-2 customers as job seekers. As stated in these memos, it is DWD's goal to quickly move W-2 participants in the direction of employment through the provision of quality upfront services based on each job seeker's assessed strengths and needs and targeted Community Service

* PROGRAM CATEGORIES:

AS--Apprenticeship Standards	FM--Financial Management Requirements	ML--Migrant Labor	TR--Transportation
CC--Child Care	FL--Foreign Labor Certification	NA--Native American Services	W-2--Wisconsin Works
CS--Child Support	IT--IT Systems	RA--Refugee Assistance	WIA--Workforce Investment Act
CF--Children First	JC--Job Center	TC--Tax Credit Programs	
CR--Civil Rights	LM--Labor Market Information	TA--Trade Assistance	

DWS-13961 (R. 07/2004)

* These requirements apply only to tribal agencies that are administering the state TANF program.

Jobs (CSJs). The memos identified a number of W-2 policy priorities and outlined strategies aimed at assisting W-2 agencies in quickly achieving the employment goals of the W-2 program.

Further recommendations were made by the Legislative Audit Bureau in its report on W-2 (April 2005) for the provision of more consistent W-2 services throughout the state and clearer accountability by local W-2 agencies. Additionally, the W-2 Sanctions Study of December 2004 provided information to support the Department's goal of moving W-2 participants into the world of work in a manner that is fair, equitable and based on approved assessment of individual strengths and accommodation of special needs.

In order to support the Divisions' W-2 program emphasis, workers must be trained in policy, reporting systems and case management skills which enable them to effectively connect low-income job seekers to work while providing adequate assessment and equitable service. In the context of W-2 as an employment program, this memo outlines FEP and RS training requirements.

SUMMARY OF TRAINING REQUIREMENTS

The following is an outline of requirements for both new and experienced W-2 workers:

New Workers

1. New Worker Training Program
2. Domestic abuse (12 hours for FEPs, 6 hours for RSs)

Experienced Workers

1. New Policy and refresher training specific to job functions and duties
2. Enhanced Case Management (12 hours)
3. Professional development (12 hours)
4. W-2 Policy Refresher training (every 3 years)

Definitions of agency functions provided by DWD 17.02:

- A FEP is a case manager employed by a W-2 agency who determines eligibility, assists in the process of determining eligibility, or performs case management functions.
- Case management is the family centered and goal oriented process for assessing the needs of a W-2 group member and his or her family for employment, training and supportive services, and assisting the W-2 group member in obtaining services to achieve self-sufficiency (DWD 17.02 [3]).
- A RS is a worker employed by a W-2 agency who performs application entry, provides an initial assessment of a potential W-2 applicant's needs, makes referrals to service providers, or evaluates an individual's need for W-2. The RS function may also include a worker employed by an agency contracted with the Department to provide access services.*

The training requirements stated in this Administrator's Memo reflect those stated in Administrative Rule DWD 17 as well as DWD expectations for training.

It is important to make the distinction between new and experienced workers. The following definitions are taken from DWD 17.02 and should be used by W-2 agencies to make decisions regarding staff training requirements.

* Recent directives from the Department have emphasized the importance of including up-front workforce attachment activities when appropriate.

- Experienced Worker means a W-2 Financial Employment Planner or Resource Specialist employed by a W-2 agency before the effective date of subsection DWD 17.02 (February 1, 2003), or a worker who has completed appropriate W-2 New Worker (initial) or related training.
- New Worker means a person who is employed by a county, private, consortium or tribal W-2 agency as a W-2 Financial Employment Planner or Resource Specialist on or after the effective date of subsection DWD 17.02 (February 1, 2003), including a permanent employee who transfers into a W-2 or related worker (FEP, RS) position, and who has not completed initial program training.

RESPONSIBILITIES OF THE STATE

DWS/BW-2/Partner Training Services

The Division's Partner Training Services (PTS) Section is responsible for coordinating all training related to W-2 and associated programs. The goal of training is to support local agencies as they administer these programs by providing agency staff with learning experiences that reflect the philosophy and policy of W-2 and the reporting skills needed to foster personal and agency accountability in service delivery. This support will include the development, delivery and maintenance of quality training services. Training events will be planned, managed, provided and coordinated by DWS Partner Training Services.

RESPONSIBILITIES OF COUNTY, PRIVATE AND TRIBAL W-2 AGENCIES

Wisconsin Works (W-2) Agency Training Liaisons (ATL)

Each county, private, consortium or tribal W-2 agency must designate an Agency Training Liaison (ATL) as a point of contact for training issues. The DWS Regional Office is to be provided with the name of the ATL and changes in personnel need to be reported to the Regional Office. The ATL does not need to be a full time trainer position. The ATL is to work with Partner Training Services on training activities and issues.

Local agencies will be responsible for the general development of their employees and for training not offered by the Department. It is the W-2 agency's responsibility to ensure that their staff has the skills needed to perform job functions. W-2 agencies are responsible for:

- ensuring that all W-2 and related staff complete training prescribed by the Department;
- ensuring that new and experienced W-2 and related workers are trained in a timely manner on all W-2 and related programs policy, procedure and automated system updates that are issued by the Department;
- ensuring that subcontracted staff complete required training;
- ensuring that the agency supplements Department training to specifically meet the needs of the agency and their workers, including training on local processes;
- maintaining automated records of staff training such as types of training attended and the dates attended (the DWS/BW-2 Partner Training Services will maintain files of DWS sponsored training);
- establishing an ongoing method of assessing its training needs and completing a training needs assessment;
- ensuring that staff is literate in personal computers, use of the Internet and word-processing software. (The Department recommends working with local technical colleges and private providers as appropriate to meet these training needs.); and,

- ensuring staff can access courses in the online Partner Training Services Learning Center (PTS Learning Center).

NEW W-2 Financial and Employment Planners (FEP) and Resource Specialists (RS)

New Worker Training Program

All FEPs and RSs employed by a county, private, consortium or tribal W-2 agency must complete the New Worker Training program. The W-2 agency shall ensure that each new FEP or RS completes the Department's initial training during the first six months of employment (DWD 17.03[2]). It is the Department's intent to supply sufficient opportunities for this learning to occur. The W-2 New Worker process can be accessed through Partner Training Services' home page at <http://dwd.wisconsin.gov/dwspts>.

No FEP may make independent decisions related to eligibility or perform case management functions until the initial W-2 training is successfully completed (DWD 17.03{2[6 b]}).

No new Resource Specialist may make independent decisions related to providing an initial assessment of potential W-2 applicant's needs, making referrals to service providers, or evaluating an individual's need for W-2 until the initial W-2 training is successfully completed (DWD 17.03{3[6 b]}).

Completion of the New Worker Training Program requires involvement and participation in all appropriate instructional activities. The topics contain the knowledge and skill areas needed to assist workers in successfully understanding the administration of W-2 and other related programs. The topics have been identified and incorporated to help the administrative agencies meet performance and quality assurance standards.

The W-2 agency shall develop evaluation strategies to ensure that a new W-2 worker achieves a minimum standard of competence (DWD 17.03[2]).

Comparable Training

A W-2 agency that chooses not to participate in the Department sponsored New Worker Training Program shall develop a plan to implement the standardized New Worker curriculum developed by the Department. This plan should include the qualifications of the trainer, the specific plans for implementing the standardized curriculum, and the facilities available within the agency to conduct New Worker Training.

An agency can submit a request to implement the full curriculum or any part of the curriculum. If an agency plans to provide a portion of the full curriculum, their new workers will participate in additional training activities scheduled by the Department to complete the New Worker Training requirements for their job function.

The implementation plan shall be submitted to DWS Partner Training Services for approval prior to the planned starting date of training when it is first offered, and annually after that. In addition, each approved agency must submit a schedule for each series of New Worker Training classes prior to the start date of that series. This schedule shall be reviewed and approved by Partner Training Services. One of the key criteria for approving an agency's request to administer the standardized curriculum is the availability of an employee dedicated to staff training responsibilities. Specifics of the plan are described in DWD 17.04(3). Contact the New Worker Training Operations Lead with questions regarding what to include in the required implementation plan. The current lead is Lynda Fischer lynda.fischer@dwd.state.wi.us.

Evaluation of Local Delivery of New Worker Training

The Department will evaluate the local delivery of its standardized New Worker curriculum. The process includes observation of face-to-face classes provided within approved agencies as well as discussions with new workers and evaluations of knowledge based on training provided. Partner Training Services (PTS) staff will conduct evaluations and the results of the evaluation will be provided to the agency trainer. PTS will follow up with agencies to discuss any improvements needed in the training program with the intent of providing support and to assist agencies in providing quality New Worker Training utilizing the Department's curriculum. The results of the evaluation will also be provided to the Regional Office for action as deemed necessary. Contact the New Worker Training Operations Lead for details of the evaluation process. The current lead is Lynda Fischer at lynda.fischer@dwd.state.wi.us.

Additional Training for New Workers

There are additional requirements for W-2 new workers, per DWD 17.03. These requirements must be completed within the first year of employment:

- New Financial and Employment Planners (FEPs) shall complete 12 hours of training in domestic abuse awareness, including case management strategies. (*Note: this course counts as 12 hours of Enhanced Case Management (ECM) training*.)
- New Resource Specialists (RSs) shall complete 6 hours of training on domestic abuse. (*Note: this course counts as 6 hours of ECM training*.)

EXPERIENCED W-2 Workers

As an employment focused program, W-2 utilizes the case management process to promote early attachment to the workforce and provide employment and advancement services in support of that attachment. Case management skills are not once mastered but are a matter of ongoing learning and refinement. DWD provides opportunity for the continual improvement of W-2 staff by requiring that experienced workers spend at least 24 hours in training activities a year.

Additionally, beginning with next contract year, experienced FEPs and RSs will be required to complete W-2 policy refresher training every three years. DWD will provide guidance and learning experiences in support of this mandate. Topics which meet this requirement are identified as such in the course descriptions. The DWS course "W-2 Refresher Training for FEPS" will meet the requirement. Experienced staff who attend this course in calendar year 2005 will have the requirement met.

Following are the annual general training requirements for experienced W-2 workers:

Enhanced Case Management Training

Twelve hours of Enhanced Case Management activities are an annual requirement of all experienced W-2 workers and supervisors within W-2, and related programs. Enhanced Case Management programs develop the ability of supervisors and workers to provide quality services to all of their customers, including customers with special needs.

Recent directives from the Department have emphasized the importance of early workforce attachment, employment stabilization forward mobility in the workforce. Enhanced Case Management activities provide an opportunity to examine the employability plan, promote early attachment to the workforce, provide career advising and design effective post employment

strategies. DWD also promotes a strength based approach to case management. Enhanced Case Management topics provide training in strategies necessary to assist participants in building on strengths. Topic categories are programmatic, interpersonal skills, special needs, and supervisory skills training.

These topics will be offered as classroom programs, or through alternate methods. Classroom programs will be offered on a regional basis. The topics are divided into four subcategories:

- **Programmatic** - These courses focus on developing knowledge and skills which will enhance interaction with customers, improve positive employment outcomes, promote strategies for meeting program requirements and assist in determining appropriate program placement. Examples of these topics are "Career Advising" "Effective Job Search and Retention Strategies for W-2," and "Case Management Interventions." Course material on diversity issues are included in this subcategory. Examples of diversity topics include "Bridges Out of Poverty" and "True Colors."
- **Special needs** - These courses assist staff in understanding behavioral, physical and situational challenges which may require accommodation, outside intervention or special strategies in working with a customer. Some topics include "W-2 Strategies for working with Families with Children with Special Needs," "Customers with Learning Disabilities," "Customers with Alcohol and other Drug Abuse Issues," and "Customers with Mental Health Issues."
- **Interpersonal skills** - These courses assist staff in developing skills and strategies for effective communication, teamwork, customer service and personal growth and development. Topics include "Bridges to Collaboration" and "Introduction to Collaboration."
- **Supervisory** - These courses are designed for current supervisors and those preparing for supervisory roles. They will help supervisors and lead workers to work effectively with staff to meet program and agency goals through practical applications and sharing of best practices.

Enhanced Case Management Topics are identified as such in the course descriptions.

Professional Development Requirement

A minimum of twelve hours of professional development is an annual requirement of all experienced W-2 workers and supervisors within W-2 and related programs.

Professional development includes, but is not limited to: DWS Enhanced Case Management programs, conferences, technical college courses, seminars, workshops, and/or policy and procedure refresher training. This professional development training does not need to be conducted or sponsored by Department staff. The county, private, consortium or tribal W-2 agency will select the appropriate professional development training for each of their workers and maintain records to document that this requirement has been met. Agencies will have full discretion as to what training fulfills this requirement for each employee, but training records, as described, must be maintained to document completion.

ALL W-2 AND RELATED WORKERS

New Policy and Refresher Training

As new policy is developed and implemented, affected workers must attend the appropriate training sessions. **Additional training in response to operational needs** based upon

Department decisions and standards will be identified as required training. Course descriptions will identify the required programs.

Coordination of W-2 Agencies and Local Child Welfare Agencies

As of January 1, 2004, W-2 requires that W-2 agency Financial and Employment Planners (FEPs) receive training in coordination with local child welfare and other community agencies to facilitate the employment of W-2 participants, their well-being and the well-being of their children. The Division's on line course on collaboration, "Introduction to Collaboration" can be accessed via distance at <http://dwd.wisconsin.gov/dwspts/cbt/collaboration/default.htm>. The Enhanced Case Management course "Bridges to Collaboration" also satisfies the contract requirement.

Skill Building Activities

DWS Partner Training Services has developed skill building activities related to reporting systems. These exercises provide experience in systems transactions that are error prone. As new activities are designed, they will be marketed on the Partner Training Services website and through the "Training Times."

Waivers and Training Equivalencies

The DWS Partner Training Section will accept reasonable, justified proposals to waive individual training program requirements, or to approve training equivalencies.

If a W-2 agency desires a waiver or to have training designated as equivalent to Enhanced Case Management material, they must submit a request outlining the reasons for the request to the appropriate DWS Regional Office. The proposal must include documentation, such as training course outlines, course materials, curriculum guides, and/or documentation of equivalent experience. If the waiver is related to substituting another training program or experience for a DWS requirement, the proposal must detail how that curriculum/experience accomplishes the objectives of the DWS program. The waiver request is available on line at http://dwd.wisconsin.gov/dwspts/resourcewebs/SupCentral/home_first-time.htm

Waiver/equivalency requests will be reviewed on a case by case basis. DWS Partner Training Services will communicate a decision no later than 30 days from the date of receipt of the request.

Training Records

Each W-2 agency is required to keep records of all training attended by each worker. The records must be maintained in an automated system that can sort by both training participant and training program information. **At a minimum, the categories of information collected should include the employee name, position title, position hire date, training program, and date of program, number of hours attended, and sponsoring organization of the training. Approved waivers/equivalencies for ECM requirements should be indicated.**

A sample training report:

Employee Name	Position Title	Position Hire Date	Training Program	Date of Training Program	Numbers of Hours Attended	Sponsoring Organization	Approved ECM Waiver/ Equiv.
Sue Smith	FEP	01/03/02	Domestic Abuse	02/03/05-02/04/05	12	DWS/ BW-2	req
Sue Smith	FEP	01/03/02	Effective Job Search Strategies for W-2	03/04/05	6	DWS/BW-2	Yes
Sue Smith	FEP	01/03/02	Mental Health Diagnostics and their Effects on Employment	04/14/05	6	WETA Mini-Conference	Yes

Training reports will be sorted by training participant and submitted on a yearly basis to the appropriate DWS Regional Office by the second Friday in January.

DWS Partner Training Services will also maintain training records for workers who attend DWS sponsored programs.

CONTACT:

Gerry Mayhew

DWS Partner Training Services Section Chief

TEL: 608/267-5056

E-MAIL: germaine.mayhew@dwd.state.wi.us

FAX: 608/267-2200